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ABSTRACT

Rather than describing shortcomings of educational planning or proposing new techniques, this paper draws on a 25th anniversary International Institute for Educational Planning seminar to show why planning is more dispensable than ever. Planning units should be strengthened and enabled to collect and analyze data, help detect major trends and developments, and assist decision-makers with a framework for programming activities. Educational planning should cease to be one ministry's monopoly and become the common concern of all major government departments and educational institutions. Educational planning must contend with intense global political changes; accelerating population growth; austere economic and financial conditions; and an educational context characterized by diversified supply and demand, lack of large-scale, inspiring projects, and persistent centralized educational bureaucracies. Current planning practices range from global indicative planning to strategic planning, subsector planning, programming, and project preparation for short-term objectives. Planners must know societal trends, communicate with political leaders, make plans more flexible, allocate educational improvement resources efficiently, and have access to essential information. Planners' responsibilities are outlined, and consequences for training and research are discussed. (MLH)

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Educational planning for the year 2000

Françoise Caillods

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Educational planning for the year 2000

Françoise Caillods

Introduction

'Educational planning, in its broadest generic sense, is the application of rational, systematic analysis to the process of educational development with the aim of making education more effective and efficient in responding to the needs and goals of its students and society'.

That definition, proposed by Ph. H. Coombs (p. 14) in 1970 in the golden age of educational planning, when countries were all setting up educational planning units and directorates, is to a large extent still valid today. Yet educational planning is in crisis. Many countries are of course continuing to prepare plans, but once those plans are approved they are not necessarily used to set educational policy and run the school system. There are countries with such a shortage of resources that whatever decisions they take get constantly impeached as the demands of day-to-day management prove more pressing than a search for medium-term consistency. Elsewhere it is political instability that prevents authorities from launching educational projects or policies with widespread support. At times planning directorates had prepared purely technical forecasts or schemes which completely overlooked the constraints political leaders must reckon with and the practical steps required to apply the measures they propose, and as a result the planners gradually became excluded from the policy-making process. Finally, liberalism and free market economics are now everywhere in fashion; some people go even as far as rejecting the whole idea of planning.

Nonetheless, what is at stake is not the need to forecast, organize and plan, but rather a certain kind of planning. Rigid, mandatory centralized State planning now appears to be clearly inappropriate. All forms of planning, however, have not been banished. Even, some of the countries that claim to be most committed to free market economics engage in some sort of planning, though they do not always admit it. They collect complete and detailed data, undertake wide-ranging studies, undertake modelling exercises, foster broad debate and guide their educational systems on that basis.

The purpose of the present paper is not to describe the problems and shortcomings of educational planning or to propose new techniques. Many books exist on such topics. Instead this document will draw extensively from the lessons learned in a seminar organized by the International Institute for Educational Planning on the occasion of its XXVth anniversary (Caillods, 1989) to endeavour to explain why planning is now more indispensable than ever. Planning must evolve to fit into a new context, but it must continue to have its rightful place in decision-making. Far from disappearing, planning units should be strengthened to enable them to collect and analyze data, help detect *major trends*, identify new developments pointing to the society of tomorrow and suggesting how much leeway educational leaders will have in the future, and to assist decision-makers and offer them a framework for programming activities. Educational planning should cease to be the

monopoly of any one ministry, and instead it should become a common concern of all major government departments and educational institutions.

I. Educational planning in its context

The last decade has been fascinating, and recent developments will inevitably have an influence on educational planning in the 1990s.

1. The political context

Some observers argue that the economic crisis which has buffeted many developing countries since the beginning of the 1980s has demonstrated the limits to government action and the inefficiency of the public sector. This new factor has contributed to the destabilizing of certain regimes and the challenging of their legitimacy. The crisis in confidence in the State, and the weakness of the public sector in many developing countries, constitutes one of the most important phenomena to emerge in recent years. This impinges directly on educational planning since it casts doubt upon the role the public sector can and/or should play. In several countries, this has resulted in a new political reality which must be taken into account, even if the issue is sometimes presented in the guise of theoretical argument.

Furthermore, the end of the 1980s was marked by great changes on the political scene: several Latin American countries became democracies once again while Eastern Europe underwent major upheaval. Although these transformations are likely not to have any immediate visible impact on education, changes will probably occur eventually in the 'hidden' curriculum that contributes to forging individual attitudes and behaviour patterns. Specialists in Eastern Europe point out, for example, that the recent social and political changes confront educators with the challenge of determining how to teach students to take initiatives, be enterprising, act more independently, be more willing to take risks. Officials will probably put less stress on altering course contents than on transforming teaching/learning strategies (the pedagogical methods and techniques used) and administration, management and regulation of the educational system. The system must evolve towards greater participation on the part of the population concerned and greater responsiveness to students' aspirations. The planning done there will have to become less rigid, and more decentralized and participation-oriented.

2. Population growth

Demographic growth may prove to be one of the chief obstacles to economic development, the achievement of universal schooling and the eradication of illiteracy. The world's population, currently estimated to be about 5 billion people, will rise to between 6.1 and 6,3 billion by the year 2000. Global population is increasing by about 1 million people every 5 days, and most of this growth is occurring in the developing countries. The population below 15 years of age in these countries is expected to represent about 50% of the total by the end of the Century (United Nations, 1988). Mammoth resources will obviously be required to accommodate this population in school, and with the prospects of continuing austerity no ready solution is in sight. Clearly, population growth is not uniformly high, and some countries (in Latin American and in East Asia) have already experienced a sharp drop in their growth rate, in what experts consider to be a genuine

change in demographic patterns. Many other countries, however, including the poorest ones, will continue to have sustained population growth and thus will have great difficulty financing adequate expansion of their school systems.

In addition, there is the issue of population migration towards urban areas, and the problem of people who fail to find employment in the modern sector of the economy and end up working in the already overcrowded informal sector. New kinds of courses, especially vocational training, and new training methods will have to be provided for such groups . These too are issues educational planning must deal with.

3. The economic and financial context

The economic and financial crisis and the structural adjustment policies applied to deal with the situation have had major consequences for those nations' economies and social systems. The impact on the education system is likely to continue into the 1990s.

The financial crisis and the increase in the cost of debt servicing have resulted in stagnation -- in some countries even in decline -- in the real value of the money available to pay for education. Since some expenditures cannot be reduced, planners have found themselves with little room to manoeuvre. In this squeeze, educational leaders in many countries have chosen to slash budget items such as new school construction, building maintenance, or minor equipment purchases, while reducing salary increases. The result has been deterioration in the quality and conditions of education.

There are good reasons to expect the austerity of the 1980s to continue into the 1990s. The measures just mentioned, put in place as temporary stopgaps, may prove harmful if they are maintained over a longer term. Political leaders and planners therefore need to envisage more radical solutions to cut costs and diversify the source of finance.

The economic crisis, which affected various countries in different ways, has had other consequences:

(a) In some countries, particularly those suffering the severest financial constraints, it has led to the worsening of unemployment and underemployment of school leavers at higher and higher levels. In addition to a serious decline in the standard of living and increasing poverty, unemployment has two consequences for education. First, it discourages students from continuing their education because they feel that the investment and sacrifices required no longer yield the anticipated rewards. Secondly, it leads decision-makers to question whether to give priority to education in the public resource allocation process. Many countries are now proposing to curtail spending on higher education and technical education, thereby perhaps jeopardizing their own development in the long run.

(b) At the other extreme, among the most advanced countries, the economic crisis has given impetus to new strategies based on the capacity to innovate, develop new products and processes, and more generally, raise productivity and restructure their economies. These countries have gradually emphasized intelligence and intellectual development as the core of their investment strategy. That too has consequences for the

development of education (its structures, contents, methods) and hence educational planning will be required to take on new tasks.

(c) Between these two extremes, one finds a broad range of middle-income countries. Some of them have benefitted from the export strategies and plant site transfers practised by major multinational corporations attracted by the low cost and high quality of manpower available there. These countries experienced rapid growth in recent years but their educational systems were not affected. In the face of ever keener international competition, however, these nations will have to keep improving the quality and flexibility of their manpower.

All these changes make planning a more arduous exercise. It is practically impossible to predict with any accuracy ten or fifteen years ahead of time what the manpower needs will be for each level of skills and speciality, even though such forecasts are essential to plan long courses of study. This question presents particularly difficult problems. In the least-advanced and middle-income countries, the economy and the debt payment issues create too much uncertainty. In more industrialized nations, uncertainty about technological change is just as great. For instance, many of the skills required in the United States and Japan by the end of the 1980s did not exist or had not even been imagined at the beginning of the 1970s. Since one cannot predict, one must emphasize high quality, versatility and flexibility in manpower training. In addition, all sorts of out-of-school, lifelong, non-formal and informal education programmes are emerging to supplement or replace in-school training because they allow people to acquire or update the special skills they need to function in the workaday world, and also to learn job attitudes and behaviour patterns more readily than they would be able to do in the regular school system.

4. The educational context

Linked to the trends outlined above, some specific developments marked the educational scene in the 1980s. Special mention may be made here of the increasing diversity in the forms of education offered, the lack of grandiose projects, and a concern instead for much more pragmatic activities like finding more money, improving educational quality or upgrading the management of the system.

4.1 Diversification of educational supply and demand

It has proved to be very difficult to determine the demand for education. Partial but concordant indications suggest that the demand for education has declined in some countries. There are areas where primary schools were built and then remained almost empty because parents became discouraged by the scarcity of job prospects in the modern sector and/or by the cost of education -- considerable even in a free system -- and therefore ceased to send their children to school. Organizers of literacy programmes are quite familiar with this problem. Supply-side management of education is not enough; one must exert influence on demand as well by mobilizing students and other participants in the process. This implies a real shift in approach for planners accustomed to overlooking changes in the demand for education or the means of enhancing that demand. Furthermore, a slack demand for basic education may coexist with a strong social demand for other kinds or levels of education,

showing people are keen to become trained in a wide variety of specialized fields, such as vocational skills, cultural interests or leisure-time activities.

In response to this demand, the kinds of education offered have also become more diverse. Companies, associations, NGOs and local communities have all taken a hand in organizing types of training courses that are more flexible and better targeted to individual needs than those found in the conventional school system. In the industrialized countries, the provision of education has gradually taken on many forms, using a variety of new facilities and equipment, such as the mass media, computers and information technologies. Distance teaching and open universities are cropping up. The Ministry of Education has ceased to have an absolute monopoly over training, even in the public sector. The methods and scope of application of the planning process should adjust to keep pace with such diversification.

4.2 Lack of large-scale inspiring projects

This is the second feature of the education scene in the 1980s. The era back in the 1960s and 1970s when researchers and observers had their attention on showcase reforms in Cuba, Tanzania, China and Peru now seems a thing of the past. Among the reasons for this change, there is, first of all, the fact that faith in education as the locomotive of development and key to greater social equality was shaken when the high hopes once placed in education sometimes failed to be fulfilled. Perhaps there has also been a growing awareness that no ready-made solutions are available to handle fundamental economic and social ills, demanding complex, tenacious efforts applied over the long term. Finally and above all, in the current economic and financial context, countries are no longer able to undertake and pursue grandiose educational projects.

People have therefore turned to more pragmatic, short-term preoccupations. They are looking around for new sources of financial support, ways to upgrade educational quality and methods for improving educational administration and management.

- *The search for new sources of funding* has certainly been a key issue in educational debate in recent years, and it is likely to remain so in view of the scene surveyed above. Substantial savings would still be possible if whatever human and physical resources are available were used more efficiently. In some countries, however, the goal of providing basic education for all children (while respecting the need for balanced development of the entire educational system) can be reached only if new resources are tapped. More and more countries are starting to charge tuition for public education in secondary schools and colleges. Authorities are also showing more interest in the student loan approach. For basic education, there are high hopes that local community financing may be available, although that brings up the question of what role the community would play in managing the schools. Reliance on private funding for education also invites consideration of the possibility of also privatising the management of educational institutions. Companies are being encouraged not only to bankroll but also to organize their own technical and vocational training programmes.

Budgetary constraints have also led to an increase in the share of educational financing that comes from foreign sources. Naturally, external funding, on average, accounts for only a modest part of overall spending on education (7 to 10%) (UNESCO, 1980). But

that money is devoted above all to capital investment and to paying for secondary and higher education. The resource allocation process is thereby straying from the goal of offering everybody the right to an education. In this regard, one may expect such assistance to be mobilized anew and reoriented after the world conference on *Education for All* in Jomtien, Thailand. In an environment of budgetary restrictions, i.e., a zero growth-rate at best, the distribution pattern for funds from foreign sources will have a clear impact on the evolution of the educational system and hence constitutes one additional constraint for planners. After all, funds for technical training or higher education in some countries might shrink entirely in the absence of international aid.

Methodologically, planners may have to take a different approach. It is one thing to plan for an expanding system in a period of abundant resources, but quite another to plan for a system with stagnant or even shrinking resources, when it is much harder but just as important to select priorities and make tradeoffs. The increasing variety of sources of funds and the range of agencies involved mean that the negotiation process must have a greater role in planning and that more participation in decision making must be encouraged in administration.

- *As for the demand for quality in education*, the financial crisis has resulted in a dramatic decline in educational services in many countries, as witnessed by (i) a lack of teaching materials, (ii) a drop in teachers' salaries in real terms or delays in paying them, which both lead to their being demobilised, (iii) a rise in absenteeism, and (iv) a decay in school premises. This deterioration in school conditions will lower the achievement level of school leavers, whether or not they receive a qualification. Unfortunately overall studies on this matter are very rare, there are increasing indications that students are no longer learning what they are supposed to learn. A recent survey in an industrialized country, where the educational system is ostensibly highly developed, has suggested that only 75 per cent of pupils leaving primary schools know how to read and write, and what is even more disturbing, only 50 per cent of them have mastered reading skills enough to continue their education. Recent studies of science and mathematics teaching made by the International Association for the Evaluation of Educational Achievement likewise suggest that academic achievement levels are poor in some of the countries examined (both the industrial and developing).

Just at a time when people are becoming aware of this decline, a demand for higher quality and better 'results' is emerging among users of the educational system, who are increasingly asked to contribute financially.

Under pressure to be more competitive, companies are insisting on higher standards when they hire staff, and they expect their future employees to have better basic skills and the specific attitudes required for their jobs. Parents and students are likewise demanding better 'results'. In the light of this trend, planners can no longer be concerned solely with questions like 'How many children can we enrol in school?' but must also wonder 'What educational conditions can we provide for them?', 'What are students learning?', and 'How can we be sure to attain minimum educational standards?'

- *Educational management and administration must become more efficient.* In most countries, the system is still highly bureaucratic. Administration is often centralized,

owing to cultural traditions, the government's determination to control educational content and quality, the desire to reduce regional disparities and promote national unity, and the shortage of qualified staff at the regional and local levels. Thus many decisions are taken at a central ministry level which ought to be handled at a lower echelon. A lack of communication between administrative echelons also hampers policy implementation, and decisions taken at the central level get only partly executed. Some critics suggest decentralizing the educational system's administration so as to enhance participation and increase the autonomy of individual schools. Such measures are supposed to encourage local initiative and make schools more responsive to the needs of the communities they serve. Other experts, on the other hand, stress the fact that decentralization may lead to major disparities between regions or communities with unequal human and financial resources, and could result in poor management. Some federal or decentralized countries are actually in the process of recentralizing their educational curriculum development and resource allocation processes questionably one of the main challenges educational planners unquestionably must face is to deal more with educational administration to improve its performance.

II. The outlook for educational planning

1. The scope of educational planning today

The concept and practice of educational planning vary considerably, depending on the economic and political context in which they are involved.

1.1 The diversity of approaches and practices

Willful, binding, centralized planning is now rather widely questioned. That type of planning seems doomed to disappear because it has proved incapable of coping with harsh realities or unforeseen events. Not even the most finely-tuned plan can claim to have anticipated everything.

Practices nowadays range from global indicative planning to what might be called strategic planning, as well as various other activities concerning sub-sector planning, programming and project preparation for short-term objectives.

In fact, the key factor is the political, and above all, the economic context. Few systems are capable of planning for their own contraction, and educational planning is no exception. In countries in the throes of a serious financial crisis, traditional medium-term planning has often given way to ad hoc planning by projects co-financed with external resources, and to strictly short-term management. Furthermore, planning units are not always involved in negotiations with the aid agencies and their proposals are not always taken into consideration. In some cases, they manage projects and programmes, and try (not always successfully) to set priorities and achieve consistency between them and the country's educational policy. But some countries are currently in such dire economic and financial straits that it is hard for them even to prepare the annual budget rationally.

On the other hand, in more favourable contexts, planning offices continue to play their traditional role, i.e., on the basis of a more or less thorough diagnosis of the situation, they provide a framework for selecting and ranking priorities, programme actions to achieve

objectives, and make the implementation process operational through a series of projects. That service is being performed in a number of small countries with stable political regimes where the educational system is not yet in an advanced state of development; the same applies to countries that have just undergone a radical change in political and social structure (e.g., independence, liberation, revolution) and where a genuine social consensus exists to develop and transform the education system; finally, it occurs at the sub-sectorial level in many countries which are committed to increasing access to secondary and higher education. In these various situations, the purpose of planning is to prepare the distribution of resources and the new opportunities. Planning entails well-established tasks, such as estimating future changes in enrolment, programming investments, arranging to train an adequate number of teachers, overseeing the production of teaching materials, negotiating with aid agencies for funding of projects, or monitoring and evaluating implementation of various programmes and projects.

Finally, there are places where the planning process has changed completely. Policy implementation and programme preparation are increasingly decentralized down to the level of the region, local community and schools, or delegated to various private operators such as companies. At the central level, planning units are showing a great deal of vitality. They are handling or running activities such as the following: (i) preparing prospective studies to predict the direction in which the system will evolve and to enlighten institutional and individual decision-makers in their choices; (ii) organizing in-depth research on the functioning of the educational system and the behaviour of the various people in it; (iii) performing research on economic, social and cultural realities that influence education and determine possibilities for action; (iv) conducting simulation studies, including generating scenarios to assess the consequences potential changes may have and set priorities accordingly.

Hence, no one single set of planning practices prevails as the decade of the 1990s gets underway. The field is very 'elastic'. In some cases it has contracted, with plans becoming less global and more oriented towards specific interventions. In other cases, it has expanded, with plans becoming strategic or englobing non-formal education and issues of educational quality. Furthermore, several different conceptions of planning may co-exist even within a single country: traditional indicative planning may be done at one level of education, and decentralized, strategic planning at some other level.

1.2 The main converging trends

Over and beyond this diversity of concepts and practices in planning, a few trends are now clear and others are emerging:

- Planners need to know in what direction society may or should be evolving. That requires them to consider, on the basis of various hypotheses, what future development would be desirable and what is likely to occur. Indeed, the main difference between a planner and an administrator is that the former is to be preoccupied with the future to determine how to orient the current system so as to achieve well-defined goals. Long-term prospective studies are indispensable in view of how long the educational process lasts and how necessary it is to coincide with the length of the planning cycle and the rhythms of political life. Such studies are likewise needed to evaluate the long-term impact of various

trends, such as demographic growth, scientific and technical change, or shifting employment structures, and then prepare measures designed to bring that probable future closer to the desirable future. Such studies help one to understand the potential impact of various decisions under consideration, so that they may be adjusted as need be before actually being put into effect. Last but not least, prospective studies are useful to foster broad debate with all segments of society about what exactly would be desirable in the future.

- Planners need to keep a continuous on-going dialogue with political leaders in order to take their constraints into account, inform them of the limits their actions may have in any given social and economic context, or explain to them the consequences of various measures put forward for consideration. The idea that planners operated outside the political realm has proved to be illusory. The only way a planner has a chance of orienting and influencing decision-making is to factor into his thinking the constraints political leaders are coping with.

- Planners must endeavour to make plans more flexible and adjustable so as to be ready for any unforeseen shifts in the economic, technological or political situation. Such flexibility is possible when short-term and medium-term plans dovetail with longer-term perspectives that set forth the goals to be worked for. The use of flexible plans is also a way to recognize that the planning activities should not take place only to prepare a plan every four or five years. Planning no longer stops once a plan has been established, for many an apparently well-conceived plan was never implemented because planners had underestimated the importance of providing for follow-up work and concrete application in programmes and projects. In practice, the activities of preparing, implementing and evaluating programmes and projects overlap with the actions of establishing, monitoring and evaluating plans. They are co-ordinated with another cycle, namely budgeting. The overlapping and interweaving of various activities cannot help but make planners aware of the constraints and difficulties involved in applying their plans, and this forces them to pay attention to such issues from the outset of the planning and programming work.

- Planners need to plan for the improvement of educational quality and the reduction of wastage in using whatever resources are available. These two points were already stressed in the first part of this paper. An education plan, in the traditional sense, does not deal with what happens inside the 'black box' of a school or concern itself with the outcome of the educational process. Under pressure from the 'users' of educational services, however, a growing number of countries are beginning to be concerned with what the children are actually learning. The pressure of budgetary constraints on the other hand makes it vital to improve resource management.

- The production, utilization and dissemination of information relevant to decision-making play a key role in planning. Planners must have many sorts of information available if they are to be useful in serving education leaders. Some information is collected regularly or ought to be: data on students, teachers, buildings and equipment, and more generally, educational conditions, costs and the source of funds. Other data is collected less regularly (depending on the country and the human and financial resources available) but is nonetheless important: data on the level of scholastic achievement, the success graduates at various levels and in various fields have in finding jobs, the changes in levels and skills required. Finally, another kind of information, although rarely collected, is crucial to

planners when they want to act: data on how various 'actors' in education respond to sundry general or specific incentive measures.

Educational planning does not stop once information has been generated for use in decision-making; that information must also be disseminated. Policies often encounter resistance merely because insufficient information was provided or the information given was incomplete or inaccurate. Broader dissemination of the information collected and the results of research, along with better verification of the reliability and neutrality of information, may contribute to clarifying issues in a debate. That effort may also enable those who traditionally had trouble being heard to have an opportunity to communicate their views when policy options and plans are being prepared.

- The traditional rigid distinction between educational planning and administration is being challenged. If the scope of planning is indeed expanded to include issues such as the form, contents, and methods used in education, the evaluation of school achievements, as well as the implementation of projects and budgets, the sharp cleavage in education between planning and administration is no longer justified. In fact, that distinction would prove a hindrance to establishing a global functional procedure to manage the educational system. This does not mean that educational planning is no longer a specific series of activities or that educational planning units are going to disappear as separate entities. On the contrary, increasing numbers of planning units are being set up in different parts of Ministries of Education, in the provinces and regions, and for that matter, even outside ministries, within private education networks, parties, trade unions, and so forth. Nevertheless, it does mean that new institutional machinery must gradually be put in place to facilitate close working relationships and co-ordinate the exchange of information and communication.

2. *Job description for planners*

The way central ministry planning units operate and the kind of people needed to staff them will change as the scope of planning expands to include new tasks, such as research, policy analysis and aspects of educational administration, as educational planners are called upon to operate in a variety of places both inside and outside government, and as the decision-making process grows in complexity to include a larger number of protagonists from the local level (pupils and teachers) up to the international level (aid agencies). More than ever before, planning is becoming a job for a full team capable of performing various tasks in research, strategic analysis, negotiations, communications, and obviously technical operations.

- *Research and information management.* Generally planners do not do research themselves, but a planning office should be able to read, evaluate and record the results of existing research, order new studies in whatever fields require it, and update and analyze an increasingly complex data base on the educational system, its operations and its relationship to the economic, social, political and cultural environment. A planning office is at the heart of a large network of quantitative and qualitative information. Planners must decide what information has priority (collecting and analyzing all information is costly) with regard to their objectives and resources.

- *Policy analysis and strategies.* Based on the information collected and the analysis made, planners offer decision-makers alternatives for which assessments have been made of the costs and short- and medium-term effects involved. Often that role is being played by a minister's chief-of-staff, a president's advisor, or a task force working for the majority party, without necessarily having all the information required. To be more directly involved in this process, the planning office should be in close touch with political authorities and be capable of treating their preoccupations and constraints as its own. The planning team must not only lay out the political choices; it should propose ways to act.

- *Negotiation and communication.* The experience of countries that tried to do indicative planning or even centralized mandatory planning clearly shows the limits to the top-down approach to change. Planners can 'set in action forces which they anticipate with have certain effects (but) the effects themselves are the result of the millions of micro-decisions made by individuals who are responding to the planners policies', (Windham, 1980, p. 109). Planners should therefore start by convincing political leaders that the path they are recommending is a wise one to take. Then they have to convince the people who will actually implement the action. They also have to make sure that the system of 'punishments and rewards' is working correctly in order to avoid any adverse consequences. As negotiators, planners must also be skilled in communication, to serve as a link between central government authorities and people at the grassroots level, so as to help information to pass up and down the line.

The planners' role as negotiators and communicators has become yet more important owing to the decentralization of administration and planning on the one hand, and the fact that both training opportunities and institutions have multiplied on the other. It is no longer merely a matter of informing and explaining. In an educational landscape featuring many decision-making centres both in and out of government, where various forms of education dwell together, planners have to inform, negotiate and convince in order to try to co-ordinate activities.

The scattering of places where people are engaged in decision-making and educational planning and the range of types of formal and non-formal education poses crucial questions. With a pattern of diversified functions and dispersed responsibilities, how can one avoid costly redundancies or even serious contradictions between activities likely to jeopardize attainment of the overall objectives? How can one avoid conflicts of jurisdiction and keep people from thwarting the needed planning process? How can one keep the system from becoming cumbersome and uneven as far as quality of work is concerned? The experience of countries with a federal form of organization suggests that this is an enormous challenge. Appropriate structures for co-operation and co-ordination and effective regulatory machinery need to be established. It turns out that more time is required to prepare and implement major educational policies and plans, and initial ambitions are gradually moderated accordingly.

- *Technical operations.* Planning is more than ever a technical function. It entails making a diagnosis of the educational system, projecting enrolment and cost figures, working on the budget, developing curricula, etc. Nobody could claim to have mastered all these fields. Educational planning is a multi-disciplinary exercise, and that should be reflected in the composition of the teams in charge of the preparation of the plans.

3. *Instruments for educational planning*

The techniques and instruments used for planning tend to become more varied and complicated.

The quantitative techniques and tools used to make diagnoses and prospective projections are increasingly sophisticated. Models with a growing number of variables are generated to present the educational situation and its environment more accurately. Computers now make it possible to process the data faster.

Along with better instruments for prospective studies, the tools used to analyze policies and plan and programme their implementation are improving. Heuristic instruments and simulation models (Delphi, etc.) are necessary to build scenarios, explore educational alternatives, measure their consequences, and test potential implementation strategies. Major corporations in industrial countries are accustomed to utilizing such tools when making their policy decisions, but educational planners have up until now rarely applied them.

There is also a need to perfect the instruments used to prepare and monitor education plans, programmes and projects. A first step in this direction has been made with the development of management information systems (often computerized) for education, which are designed to monitor and control the main input variables (teachers, financial resources, textbooks, etc.), output variables (examination results, diplomas granted, jobs found, etc.), and process variables (pupil/teacher ratio, amount of support from inspectors and education consultants, degree of independence in school management, training for administrators, etc.) in the educational sector. Nevertheless, the number of researchers specializing in the field of indicators on the 'quality of education' is small although not negligible. A concern for better control over the results and the processes involved when plans, projects and other initiatives are implemented in the education sector, with a view to making whatever adjustments are necessary, should lead to increased reliance on such evaluation tools.

Better preparation and monitoring of the process of implementing educational policies obviously requires much more than the use of sophisticated information and evaluation instruments; the budget or budgets should also be put to better use in order to achieve rational, flexible planning and programming of education. Consideration should be given to making more systematic use of programme budgeting, a technique which has been praised for its usefulness since the end of the 1960s and which has been introduced successfully in various developing countries. In some cases, the establishment of more flexible routine budgets (introducing margins to adjust resource allocation, including funds earmarked for specific medium-term projects, etc.) has made it possible to be more flexible in programming educational activities. At the same time, financing methods and resource allocation procedures should be utilized more as regulatory mechanisms. Such techniques ought to help make investment choices more rational. What items or kinds of expenditures and what institutions and administrative levels should the resources be aimed at to best achieve the desired effects, motivate people, mobilize resources, and reduce wastage? Methods should be developed to answer such questions.

Other means may also prove critical in regulating the educational system.

Examinations, for instance, are a yardstick that may be used as a device to encourage teachers, students and parents. One should not neglect the possibility of influencing teaching and learning practices by altering course contents and final examinations. Similarly, one could use changes in the examination system as a way to control certification procedures and select people for employment, regulate the flow of students, guide them towards particular levels or educational sub-sectors, or perhaps make the system's internal efficiency greater. Last but not least, although planners often overlook regulations, they contain a whole series of ways to control and enhance the process of implementing desirable educational policies, plans and projects.

III. Consequences for training and research

1. Consequences for training

The above observations have important consequences for the training of educational planners, and implications concerning the number of people to be trained, the procedures to train them, and the contents of such training.

As has been emphasized above, in a growing number of institutions there are now people who are more or less explicitly engaged in planning. These include the staff in central planning divisions and ministerial cabinets, schools and universities, and regional, district and local units. Planning is being done in ministries of education, independent training centres, human resource departments of major corporations, and other ministries engaged in education (e.g., a ministry of planning, of budgeting, of labour and employment, of agriculture, of health services, etc.), parts of projects funded by external aid which often enjoy considerable independence and clout -- as well as specialized government-run institutions like national educational institutes, curriculum development centres, vocational guidance centres, etc.

Obviously, not all such groups need the same kind or amount of training. Some people (decision-makers) should be briefed on problem and policy analysis. Others (personnel working in planning offices at the central or regional level) need lengthier training, including sessions that develop their ability to analyze and communicate, and specialized courses on specific techniques and methods. Yet other staff require highly specialized short-term training programmes tailored to their particular fields. Teams, made up of people with different backgrounds but with a common concern to strive and guide social change and anticipate decisions in their specific field, should receive instruction organized in a variety of ways, including traditional short- or medium-term courses, distance teaching or mixed approaches. A substantial amount of teaching materials will be needed for use in distance teaching and to supplement traditional course offerings. The existence of new technologies should also make it possible to present these materials in various ways, combining written material with video films and microcomputer programmes. Whatever the media used, it may be wise to choose approaches that have a built-in multiplier effect, such as training of trainers or training supervisors who then train their staff. That rule is valid not only for large countries but also for small or medium-size ones considering the large number

of people who will need training at the local level (inspectors and school principals) and the staff turnover.

2. *Consequences for research*

Among the many consequences for research, three particularly promising avenues deserve mention here.

- Comparative analysis of practices in educational planning. Educational planning as a process and technique developed most at a time when formal education predominated and when nobody challenged the central role of the State in organizing and financing education. The current scene is quite different. Many countries, including those with a long tradition of direct centralized management or control, are now questioning the role of the State as a social regulator both in general and in the specific field of education. In-depth research is needed to explore the direction educational planning has taken and determine the consequences for various countries. We might, for instance, study the case of countries that have undergone some thorough political and social transformation, or we might contrast the experiences of two or more countries in different conditions, e.g., one in the midst of a boom and another that is stagnating or declining, or we might pick one with a dominant public sector to contrast with another where the private sector plays a major role.

- Planning and the problems of today

The search for equity. How can education be fostered for the most disadvantaged?

In a situation characterized by keen competition, the quest for equity is justified both on ethical and moral grounds -- giving everybody the right to education -- and for reasons of efficiency and support for economic, social or cultural development strategies. Determining how to design a fair system and offer education to society's most disadvantaged groups is certainly a priority topic for research in educational planning.

This problem is moreover a familiar one. A large proportion of the school-age population in developing countries does not have access to the educational system even though there would be ways to accommodate them in school, and many children also drop out of school after only a year or two. Some reasons for this drop-out pattern are obvious but others are more subtle: for example, schooling may fail to keep its promise of leading to employment, in which case it is rejected like a foreign body. More generally, schools do not deliver what is expected. Even in developed countries, many children fail to learn what is taught, and after several years of schooling they are still illiterate. It is therefore necessary to change the school and offer other forms of training better suited to particular clienteles. For planners, this brings up a whole series of questions about course contents, methods, organization and length of schooling, teacher profiles, recruitment and training, the location of education centres, the management and financing of institutions, and the co-ordination between networks and with various non-governmental agencies. By searching for and analyzing the experiments already in progress, one should be able to come up with answers to questions such as the following:

- What course contents and teaching methods are most appropriate for underprivileged groups?

- To what extent does participatory management and the involvement of parents and community members in establishing curricula or managing the schools constitute part of the answer to the questions raised?

- What is the cost and impact of the various approaches currently being experimented with?

- To what extent do various sorts of non-formal education programmes offer real alternatives? Or, on the contrary, to what extent do they constitute only a kind of low-grade cheap educational substitute?

Education for development: the search for excellence

One of the most important challenges educational planners must respond to is that of fostering technological development in various countries. The world has been experiencing a real explosion in technology in recent decades, yet some societies have been affected more than others by such progress. The enhancement of human resources is seen as a key to success in the race for development and the search for competitiveness and excellence. Emphasis is now being put on improving the quality of education and training at all levels from primary school upwards, on scientific and technical training in secondary schools and universities, and on diversification of the kinds of training offered. Planning human resources development has become very complicated. On the one hand, it is hard to forecast manpower needs; on the other, more and more institutions offer a variety of training schemes. In addition, education, particularly higher education, has become a bone of contention in society, and hence hard to control. Any attempt to increase the selection process at that level, for instance, so as to enhance educational quality, encounters fierce resistance. Similarly, efforts to push students into qualifying in science rather than the humanities have proved ineffective.

In this context, the challenge for educational planning consists of improving the quality of training in basic skills, raising the level of general and technical background knowledge taught in school, particularly by enriching science courses early in the school curriculum, and facilitating the emergence of post-secondary school training programmes to encourage adaptation and swift specialization. Some of the key questions that planners are wrestling with and which research should find evidence for are the following: How can science teaching be improved in secondary schools without an undue increase in costs? How can one give a larger number of people access to scientific knowledge, particularly women, children from disadvantaged backgrounds and others who are usually excluded from this kind of training? Finally, how can one improve the way in which institutions of higher learning and technological institutes are managed?

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IIEP Contribution No. 4

As we enter into the 1990s, educational planning is coming under mounting criticism in certain academic circles. The issue is not, however, whether one should forecast, organize and plan but what kind of planning is needed to respond to today's changing conditions.

Starting with an analysis of the present political, economic and financial situation, this paper argues that educational planning is more indispensable than ever -- planning units, says the author, must be strengthened to assist educational leaders in their decision-making process. Planners are now expected to collect and analyze data on the many and varied aspects of the educational process and its outcomes, help detect major trends and suggest how much scope decision-makers will have in the future. Educational planners are also having to pay more and more attention to implementation strategies. In this situation, new educational planning instruments are therefore required.

In addition, planning should cease to be the monopoly of any one ministry and become the common concern of all major government departments and institutions. Such a change has direct consequences on the needs and strategies for training educational planners.

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